

**SFA MODERNIZATION
PARTNER PROJECT**

**CONTRACT STATUS REPORT
(Monthly)**

9/15/99 - 10/15/99

Activity Summary (Month ending 10/15/99)

Planned Activities		Results
PMO (Dave Gordon)		
<ul style="list-style-type: none">Completed Deliverable #1 for TO1 - Concept of Business OperationsContinue work on Deliverable #2 for TO1 – Establish Key Program Management ProcessesInitiated work on TO2 Deliverables – Program Plan, Quick Hits and Value Creating Opportunities and Capability Release Plan	<ul style="list-style-type: none">Delivered Concept of Business Operations to Carol Seifert, 10/7/99; expect acceptance of document by ED by 10/21/99Reviewed initial process with Carol Seifert and received confirmation of directionDeveloped staffing approach and identified potential legacy contractor team membersLoaded initial SFA project list from IRB and Tom Peska into Access DB for analysis and tracking	
Financial Aid Reengineering (Karl Augenstein)		
<ul style="list-style-type: none">Create draft project definition for Direct Loan ReengineeringMeet with project sponsor, GM for Students to agree on project definitionBegin development of amendment to Task Order #2 to reflect changes	<ul style="list-style-type: none">Draft project definition completedFirst and second meeting heldDevelopment has begun for amendment	
Enterprise Engineering & Integration (J. Michael Lee)		
<ul style="list-style-type: none">Start Configuration Management approach	<ul style="list-style-type: none">Configuration Management approach startedSubmitted Task Order #4 for Enterprise Architecture Management to Harry Freely, Connie Davis, Carol Seifert, and Denise Hill for review	
Partner Management (Mike Swain)		
<ul style="list-style-type: none">Establish Task Order (TO) 1Establish Engagement Control OfficeEstablish Contract Management relationshipEstablish format for Monthly Contract Management ReportEstablish format for Contract Management PlanEstablish TO2Establish TO3Select Performance SubcontractorReadjust TO3 start until after Oracle training (week of 10/18/99)	<ul style="list-style-type: none">TO1 Awarded 9/27/99 effective 9/16/99Initial Staffing accomplishedFirst regular weekly Contract Status meeting held 9/22/99Format approved by SFA 10/6/99Format approved by SFA 10/7/99TO2 Awarded 9/30/99 effective 10/1/99TO3 Awarded 9/30/99 effective 10/1/99Oracle Corp selectedDiscussed with SFA	

SFA MODERNIZATION PARTNER PROJECT

Plans (Month ending 10/15/99)

Planned Activities
<i>PMO (Dave Gordon)</i>
<ul style="list-style-type: none"> • Complete Review and Submit TO1 Deliverable #2 – Establish Key Program Management Processes – Due 10/15/99 • Continue development of TO2 Deliverables - Program Plan, Quick Hits and Value Creating Opportunities and Capability Release Plan <ul style="list-style-type: none"> • Begin staffing of legacy contractors on PMO task activities • Identify review dates for deliverables
<i>Financial Aid Reengineering (Karl Augenstein)</i>
<ul style="list-style-type: none"> • Complete draft of amendment to Task Order #2 to reflect changes in scope • Begin discussions with COTR on amendment • Identify members of Core Team • Develop project plan
<i>Enterprise Engineering & Integration (J. Michael Lee)</i>
<ul style="list-style-type: none"> • Socialize outline of configuration management approach with key stakeholders • Begin development of Stage Entry and Exit Criteria as part of Critical Methods and Standards deliverable with initial draft of Entry and Exit Criteria due 10/29 • Collect and examine tool selection criteria that led to choice of Sterling Software's Cool Suite • Develop recommendation of development tool by 10/18
<i>Partner Management (Mike Swain)</i>
<ul style="list-style-type: none"> • Introduce new weekly Contract Review agenda format and content (Risk and Issue Management) • Deliver first weekly Modernization Partner Program Summary (review at weekly Contract Review meeting, present at CIO weekly status meeting) • Deliver Monthly Contract Report • Deliver Contract Management Plan • Complete performance on TO1

SFA MODERNIZATION PARTNER PROJECT

Deliverables (all)

Deliverables	Status	Planned Draft Date	Actual Draft Date	Planned Delivery Date	Actual Delivery Date
Task Order 1 (PMO)					
Concept of Business Operations	In Progress	10/04/99	10/04/99	10/06/99	10/06/99
Critical Program Management Processes	In Progress	10/12/99		10/15/99	
Contract Management Plan	In Progress	10/14/99		10/15/99	
Monthly Report	In Progress	10/12/99		10/15/99	
Task Order 2 (PMO)					
Program Plan/ Quality Plan/ Communication Plan	In Progress	10/22/99		11/01/99	
Monthly Program Status Report	In Progress	10/22/99		11/01/99	
Recommended Value Creating Opportunities/Industry Benchmarks	In Progress	11/08/99		11/15/99	
Business Capability Release Plan	In Progress	11/22/99		11/29/99	
Monthly Program Status Report	In Progress	11/22/99		11/29/99	
Monthly Program Status Report	Not Started	12/22/99		12/29/99	
Monthly Program Status Report	Not Started	01/21/00		01/31/00	
Monthly Program Status Report	Not Started	02/21/00		02/28/00	
Monthly Program Status Report	Not Started	03/23/00		03/30/00	
Task Order 2 (Enterprise Engineering & Integration)					
Configuration Management Approach	In Progress	11/22/99		11/29/99	
Critical Methods and Standards	In Progress	12/22/99		12/29/99	
Systems Integration and Test Approach	In Progress	12/22/99		12/29/99	
Deployment Approach	In Progress	01/21/00		01/31/00	
Post-Deployment Maintenance Approach	Not Status	02/21/00		02/28/00	
Task Order 2 (Financial Aid Origination)					
Draft Conceptual Design	TBD	TBD		TBD	
Final Conceptual Design	TBD	TBD		TBD	
Business Case	TBD	TBD		TBD	
Value Based Project Approach	TBD	TBD		TBD	
Draft Business Capability Release Plan	TBD	TBD		TBD	
Task Order 2 (Partner Management)					
Acquisition Strategy	In Progress	10/22/99		11/01/99	
Partnership Management Plan	In Progress	10/22/99		11/01/99	
Monthly Report	In Progress	10/22/99		11/01/99	
Legacy Contract Transition Plan	In Progress	11/22/99		11/29/99	
Contract Management Plan	In Progress	11/22/99		11/29/99	
Monthly Report	Not Started	11/22/99		11/29/99	
Monthly Report	Not Started	12/22/99		12/29/99	
Monthly Report	Not Started	01/21/00		01/31/00	
Monthly Report	Not Started	02/21/00		02/28/00	
Monthly Report	Not Started	03/23/00		03/30/00	
Task Order 3 (Financial Management)					
Project Plan	In Progress	10/06/99		10/08/99	
Concept of Operations Validation	In Progress	10/19/99		10/26/99	
Conversion Strategy	In Progress	10/25/99		11/01/99	
Identify 2 Pilot Implementations	In Progress	10/25/99		11/01/99	
Implementation Plan	In Progress	10/25/99		11/01/99	
Monthly Report	Not Started	10/22/99		11/01/99	

SFA MODERNIZATION PARTNER PROJECT

Monthly Report	Not Started	11/22/99		11/30/11	
Monthly Report	Not Started	12/22/99		12/30/99	
Monthly Report	Not Started	01/21/00		01/31/00	
Financial Management System Design	In Progress	01/27/00		02/03/00	
Monthly Report	Not Started	02/01/00		02/28/00	
Financial Analysis & Business Case	Not Started	02/28/00		03/06/00	
License Pricing Analysis	Not Started	03/02/00		3/09/00	
Final Report / Design	Not Started	03/07/00		03/14/00	

Schedule of Key Meetings (month ending 10/15/99)

Key Meeting	Date
1:30-3 Weekly Mod COTR	09/15/99
10am IT-IRB Meeting	09/21/99
1pm Management Council Meeting	09/21/99
8:30am-9am Meeting with SFA COO	09/22/99
1:30-3 Weekly Mod COTR	09/22/99
10am IT-IRB Meeting	09/28/99
1pm Management Council Meeting	09/28/99
8:30am-9am Meeting with SFA COO	09/29/99
1:30-3 Weekly Mod COTR	09/29/99
10am IT-IRB Meeting	10/05/99
1pm Management Council Meeting	10/05/99
8:30am-9am Meeting with SFA COO	10/06/99
1:30-3 Weekly Mod COTR	10/06/99
10am IT-IRB Meeting	10/12/99
1pm Management Council Meeting	10/12/99
1-2pm SFA CIO Meeting w/ Petchon, Gordon	10/12/99
8:30am-9am Meeting with SFA COO	10/13/99
1:30-3 Weekly Mod COTR	10/13/99
1-2pm SFA CIO Meeting w/ Petchon, Gordon	10/14/99

SFA MODERNIZATION PARTNER PROJECT

Overall Project Schedule

(See Microsoft Project Gantt Chart)

SFA MODERNIZATION PARTNER PROJECT

Personnel Status

NAME	ORG'N	Level	Team
<i>DLOR</i>			
Bartold, Melissa	KPMG		DLOR
Marr, David	KPMG		DLOR
<i>ECO</i>			
Gidwani, Mahesh	AC	AP	ECO/PMO
Goodman, Steve	AC	AP	ECO
Baines, Sue	AC	Manager	ECO
Swain, Mike	AC	Manager	ECO
Morris, Rex	AC	Specialist	ECO
Azuma, Yoko	AC	Consultant	ECO
Moore, Liz	AC	Consultant	ECO
Morrisett, Geoffrey	AC	Consultant	ECO
Ries, Todd	AC	Consultant	ECO
Shrader, Greg	AC	Consultant	ECO
Paine, Lucas	AC	Analyst	ECO
Anguiano, Linda	AC	Exec. Assistant	ECO
Washington, Kiyaa	AC	Assistant	ECO
<i>Enterprise Engineering & Integration</i>			
Lee, Michael	AC	AP	EE&IT
Burton, Doug	AC	Manager	EE&IT
Jenkins, Jim	AC	Manager	EE&IT
Meigides, Tony	AC	Manager	EE&IT
Elkins, Debra	AC	Exp. Consultant	EE&IT
Epee-Bounya, Samuel	AC	Consultant	EE&IT
Hannan, Michael	KPMG	Consultant	EE&IT
O, Eddie	AC	Analyst	EE&IT
Pavlik, Tim	KPMG		EE&IT
Sobiloff, Blake	KPMG		EE&IT
<i>Financial Aid</i>			
Augenstein, Karl	AC	Manager	Fin. Aid
Dublin, Beth	AC	Exp. Consultant	Fin. Aid
<i>FMS</i>			
Aldridge, Cynthia	AC	AP	FMS
<i>Organization Development</i>			
Thurston, Judith	AC	AP	Org Dev
Nguyen, Linh	AC	Manager	Org Dev
Shaffer, Nicole	AC	Manager	Org Dev
Yeh, Mimi	AC	Manager	Org Dev
Putzulu, Shantil	AC	Specialist	Org Dev
Logsdon, Michael	AC	Consultant	Org Dev
Miller, Maria	AC	Consultant	Org Dev
Patch, Michele	AC	Consultant	Org Dev
Rothman, Amy	AC	Consultant	Org Dev
Shukla, Anita	AC	Consultant	Org Dev
Smith, Carrie	AC	Consultant	Org Dev
Vavra, Stacy	AC	Consultant	Org Dev
White, Karen	AC	Consultant	Org Dev
Malague, Katie	AC	Analyst	Org Dev
Shortlidge, Joy	AC	Analyst	Org Dev
<i>(continued on next page)</i>			

SFA MODERNIZATION PARTNER PROJECT

NAME	ORG'N	Level	Team
<i>Program Management Office</i>			
Gidwani, Mahesh	AC	AP	ECO/PMO
Gordon, Dave	AC	AP	PMO
Higgins, John	AC	Manager	PMO
Trahan, Kerry	AC	Manager	PMO
Die, Linda	AC	Exp. Analyst	PMO
Woodhouse, Andrew	AC	Analyst	PMO
Ward, Chris	AC	Manager	
Petchon, Steve	AC	Partner	
Shane, Steve	AC	Partner	
<i>Other</i>			
Woods, Bob	ACS		
Gould, Scott	Exolve		
Hoenig, Chris	Exolve		
Kellman, Steve	Harvard University		
Baroni, Greg	KPMG		
Clark, Kelly	KPMG		
Crowley, Katie	KPMG		
DeSeve, Ed	KPMG		
Dorian, James	KPMG		
Dougherty, Donald	KPMG		
Huff, Lawrence	KPMG		
Kaplan, Heather	KPMG		
MacCarthy, Sarah	KPMG		
Barfield, Sharon	NCS		
LaFever, Roxie	NCS		
Lawson, Laurie	NCS		
Ledman, Chris	NCS		
Schneider, John	NCS		